



COMDTINST 12570.3D

MAY 31 1997

COMMANDANT INSTRUCTION 12570.3D

Subj: INVITATIONAL TRAVEL

Ref: (a) Title 5, U. S. Code, Section 5701 through 5709
(b) Department of Transportation (DOT) Guiding Principles, DOT Order 1500.11
(c) Office of the Secretary of Transportation memo dtd 3 June 1994
(d) Office of the Secretary of Transportation memo dtd 30 May 1995

1. PURPOSE. This Instruction provides guidance on the preparation and approval of invitational travel orders (ITO's) within the Coast Guard.
2. ACTION. Area and district commanders; commanders of maintenance and logistics commands; commanding officers of Headquarters units, assistant commandants for directorates, Chief Counsel, and special staff offices at Headquarters shall ensure compliance with the provisions of this Instruction.
3. DIRECTIVE AFFECTED. Commandant Instruction 12570.3C is canceled.
4. BACKGROUND: Reference (a) permits the issuance of ITO's when a person travels in connection with the official business of the U. S. Coast Guard. Because the Federal Travel Regulation (FTR) and Department of Transportation Secretarial delegations, in references (b) through (d), do not provide guidelines for issuance and approval of ITO's, this Instruction is necessary.
5. CUSTOMARY USE OF ITO's. ITO's authorize the expenditure of funds to persons with whom the Government does not have a contractual or an employer-employee relationship. They should be sparingly used. The long-standing, critical concern regarding potential abuse of invitational orders has resulted in a high-level retention of approval authority and in the need to ensure each ITO is directly related to the conduct of a Coast Guard function or mission. Given significant budget constraints, the actual need for ITO's to meet program

DISTRIBUTION - SDL No.134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A																										
B		8	21*	1	12	10		5	6	3	5	3	2	4	2	1		3	2	1	1	1	11	1		1
C	2	1		3	1				1		3	1	3													
D				*							1		1								1	1	1		1	
E																										
F																										
G																										
H																										

NON-STANDARD DISTRIBUTION: B:c MLCLANT, MLCPAC (16 extra); D:d Boston, South Portland, Southwest Harbor, Woods Hole, Long Island Sound, New York, Baltimore, Hampton Roads, Charleston, Humboldt Bay (1)

MAY 31 1997

requirements should be constantly evaluated. Often these needs can be met without use of ITO's (e.g., use of Coast Guard personnel, use of other Federal agencies, use of purchase requests with servicing procurement office approval).

6. EXCLUSIONS: Travel of non-Federal employees, authorized by other programs under specific statutory authority, is excluded from the provisions of this Instruction as follows:
 - a. Witnesses at Military Courts-Martial. Witnesses are subpoenaed for attendance at military courts-martial under the authority of 10 U.S.C. §846 or 28 U.S.C. §1821. This type of travel is governed by the provisions of Section 2-Q of COMDTINST M5810.1 (series), Military Justice Manual. Commandant (G-L) is the responsible office.
 - b. International Students Training Under the Security Assistance Program (SAP). The Security Assistance Program (SAP) is a Department of State foreign relations program, implemented by the Department of Defense, executed by the five military services, and funded by the Foreign Military Sales (FMS) and the International Military Education and Training (IMET) programs. Guidance for these programs fall under the provisions of the Joint Security Assistance Training (JSAT) Regulation. Commandant (G-CI) is the responsible office.
 - c. Nonappropriated Fund Employees. Nonappropriated fund officials or employees traveling on nonappropriated fund business will not be authorized to travel under the provisions of this Instruction.
 - d. Contractors. Travel for contractors should be supported and considered in contract specifications and costs. Issuing invitational travel orders to a contractor could place the Coast Guard in a position of supplementing contracts.
 - e. Federal Government Employees or Members of the Uniformed Services. Federal Government employees or members of the Uniformed Services will be issued Temporary Duty (TD) travel orders.
7. RESPONSIBILITIES.
 - a. Requesting Official. The Coast Guard official who requests issuance of ITO's shall prepare necessary documentation, obtain program manager concurrence, and forward ITO's for review and approval. In preparing the ITO, the requesting official should follow enclosure (1) guidelines and ensure the traveler is aware of the guidelines provided in enclosure (2).
 - b. Area Commanders; District Commanders; Commanders of Maintenance and Logistics Commands; Assistant Commandants for Directorates; Chief Counsel; Special Staff Offices at Headquarters; and Commanding Officers of Headquarters Units. These officials shall review and personally endorse all ITO's prior to forwarding for final review and approval. This review must ensure that the travel meets the stringent requirements of today's budget. ITO's must receive the same thorough review for

MAY 31 1997

sufficiency and effective use of Coast Guard funds germane to any other travel issue.
“Nice to do” travel is simply inappropriate.

- c. Travel Approving Official. Officials delegated authority to approve invitational travel orders are identified in enclosure (3). These officials are responsible for ensuring all ITO's are effected in accordance with this Instruction.



R. D. HERR
Vice Admiral, U.S. Coast Guard
Acting Commandant

Encl: (1) Guidelines on Preparation of ITO's
(2) Guidelines for Invitational Travelers
(3) ITO Approving Officials

GUIDELINES ON PREPARATION OF
INVITATIONAL TRAVEL ORDERS

1. Mode of Transportation. All costs are limited to the cost of coach travel on commercial transportation. Therefore, the mode of transportation should be evaluated carefully. Travel arrangements should be made through the command's local Travel Management Center (TMC) with tickets either forwarded to the traveler's home or office, or arrangements made with the airline for pick up upon airport departure. Itineraries and travel expenses should be as cost-efficient as possible.
2. Lodging and Incidental Expenses. ITO's are subject to the same limitations on reimbursement as regular civilian employee travel orders (e.g., prohibition on use of travel agents, cash purchases for common carrier services exceeding \$100, use of Government lodging rates). Therefore, it is best that all lodging be arranged for the traveler.

Note: Ombudsman incidental expense reimbursement is explained in COMDTINST 1750.4B, Ombudsman-Command Family Representative.

3. Local Travel. The use of a rental car, if necessary and authorized, shall be indicated in the ITO's. One rental car should serve a group of travelers. Reservations should be made through the command's local TMC.
4. Travel Order Number and Fund Citation. The travel order number and fund citation for each set of ITO's must be assigned from the unit's account.
5. Letter of Justification. The travel requesting official shall provide written justification for endorsement by the travel approving official. This justification must clearly detail the need for ITO's, the work to be performed, and the benefit to the Coast Guard.
6. Copy of ITO for Finance Center. A copy of approved ITO's shall be sent to the Finance Center (Attention: OGQ) at the time the travel order is issued in order to track outstanding travel advances or claims.
7. Coordination. The Travel Requesting Official assures accuracy of all requests and certifies the:
 - a. Interest of Government. The travel is in the interest of the Government and the justification is endorsed.

- b. Program Manager Concurrence. Obtain the review and concurrence of the program manager. In the absence of this review, ITO's will be forwarded to the program manager when received in Headquarters.
- c. Traveler's Information. This ensures that all travelers are aware of the applicable travel regulations and prohibitions (e.g., the prohibition of cash purchases for common carrier services exceeding \$100, prohibition on use of first class travel).

8. PREPARATION OF INVITATIONAL TRAVEL ORDERS.

- a. Use of CG Form 4251. CG Form 4251, "Military Temporary Additional Duty (TAD) or Civilian Temporary Duty (TD) Request and Travel Order" **may** be used. These orders shall have the requesting command's address and phone number in the remarks section of all ITO's.
- b. Letter Orders. Letter orders **may** be prepared by personnel requesting invitational travel orders. Letter orders must contain complete and accurate data on all appropriate travel entitlements. Attached is a sample "letter order" which may be modified as appropriate. Letter orders shall have the **requesting command's address and phone number** at the top of the letter.
- c. Wording to Include in Orders (CG Form 4251 and Letter Orders). Travel orders shall:
 - (1) Cite specific dates and point(s) (city and state) of departure, temporary duty site, and return location. The departure and return points are usually the traveler's home but may be another point, i.e., a temporary duty site.
 - (2) Contain a detailed statement of the work to be performed and its benefit for the Government. This would include the wording: "...in connection with official business of the United States Coast Guard...", but not limited to that, i.e., the statement should explain the nature of the "official business."
 - (3) Contain the statement "Commercial carrier tickets have been/will be provided to you. (Tickets must be for coach or economy class only. First class travel is prohibited.) If you travel by privately-owned conveyance, reimbursement will be at (insert appropriate mileage for the time travel is to be performed) per mile, plus the cost of necessary parking fees, bridge, ferry and highway tolls. Total reimbursement will be limited to the cost of travel by the usual mode of common carrier, including per diem. In the event that your travel is canceled or altered, all unused tickets for transportation must be returned to the appropriate travel office along with your original travel orders and your completed travel voucher. All such tickets are the property of the U. S. Government and are not to be used for any travel that is not authorized."

- (4) Include an estimated cost, travel order number and cite funds to be charged. The travel order number and fund citation shall be assigned by the travel requesting official and charged to the appropriate unit's account.
 - (5) Contain the traveler's Social Security number.
 - (6) Contain the written statement that the traveler must file the travel claim within 3 **working** days upon completion of travel, and must contain the appropriate address for the traveler to submit such claim. (A preaddressed envelope and travel voucher shall be included with the orders.)
- d. Timeliness of Submission. Invitational travel orders should be submitted for approval at least 1 - 2 weeks in advance of the travel. The orders **must** be signed by the appropriate approving official **before** the individual can travel. In no instance should travel begin prior to the orders being approved by the appropriate approving official.
- e. Coordination with Commandant (G-WP). All ITO's requested below the level of G-CCS or G-CCS's immediate staff but requiring approval of G-CCS or higher, must be coordinated through G-WP.
9. RATES AND REIMBURSEMENT. Travel entitlements frequently change with little, if any, notice. Therefore, prior to preparing any travel authorization, including ITO's, it is suggested that travel requesting officials check current rates with the travel office.

SAMPLE INVITATIONAL TRAVEL ORDER LETTER

Unit's address
Phone Number

12570

TONO: (Travel Order Number)

(Addressee)

(Social Security Number)

(Mailing Address)

Dear (Addressee):

This is to request that you proceed on or about (date of travel), from (location from which travel is to start) to (destination of travel) for the purpose of (purpose for which travel is authorized) in connection with the official business of the United States Coast Guard. (Provide a detailed identification of the official business or work to be performed and its benefit to the Government.) Upon completion of this temporary duty, the duration of which will be approximately (number) days, your return to (location from which travel is to start) is authorized.

You are authorized to travel by coach or equivalent class on commercial plane, common carrier and/or privately-owned conveyance. (Indicate if tickets are enclosed or where tickets are to be obtained.) In the event a privately owned automobile is used for all or part of your travel, e.g., to or from airports, train stations, etc., you will be reimbursed for the official use of it at the rate of (insert current mileage rate) cents per mile provided the total cost to the Government, including per diem, does not exceed the cost of travel by common carrier. Local travel is (or is not) authorized. Rental car is (or is not) authorized.

While in a travel status, you will be allowed traveling expenses in accordance with Federal Travel Regulation (FTR) which currently allow reimbursement for lodging expenses up to (indicate current lodging rate) per day and an allowance for meals and incidental expenses of (indicate current meals and incidental expenses rate) per day, chargeable to accounting data: (accounting data).

Upon completion of this travel, it is requested that your original travel orders (this letter), your travel voucher DD Form 1351-2 (enclosure (1) to this letter), with receipts for local travel (if over \$75.00), air fare, and lodging be mailed back to:

Commanding Officer (TVL)
Coast Guard Human Resources
Service & Information Center
444 S.E. Quincy Street
Topeka, KS 66683-3591

in the enclosed self-addressed envelope (enclosure (2)) within 3 **working** days. In the event that your travel is cancelled or altered, all unused tickets for transportation must be returned to the travel claims office along with your original travel orders and your completed travel voucher. All such tickets are the property of the U. S. Government and are not to be used for any travel that is not authorized. If you have any questions, please call the travel claims office's Customer Service line at (913) 295-2250 or (point of contact), (contact's address), on (telephone number).

Sincerely,

Encl: (1) DD Form 1351-2, Travel Voucher
(2) Self-addressed envelope

GUIDELINES FOR INVITATIONAL TRAVELERS

1. MODE OF TRANSPORTATION. All costs are limited to the cost of coach travel on commercial transportation. Therefore, your mode of transportation should be evaluated carefully. Travel arrangements should be made through the command's local Travel Management Center (TMC) with tickets either forwarded to your home or office, or arrangements made with the airline for you to pick up upon airport departure. Itineraries and travel expenses should be as cost-efficient as possible.
2. LODGING AND INCIDENTAL EXPENSES. ITO's are subject to the same limitations on reimbursement as regular civilian employee travel orders (e.g., prohibition on use of travel agents, cash purchases for common carrier services exceeding \$100, use of Government lodging rates). Therefore, it is best that all lodging be arranged for you by the Coast Guard.
3. LOCAL TRAVEL. The use of a rental car, if necessary and authorized, shall be indicated in your ITO's. One rental car should serve a group of travelers. Reservations should be made through the command's local TMC.
4. TICKET INFORMATION. Travel regulations prohibit cash purchases for common carrier services exceeding \$100 and the use of first class travel. Commercial carrier tickets should be provided to you. Tickets must be for coach or economy class only as first class travel is prohibited. If you travel by privately-owned conveyance, reimbursement will be at the appropriate mileage rate for the time travel is to be performed per mile, plus the cost of necessary parking fees, bridge, ferry and highway tolls. Total reimbursement will be limited to the cost of travel by the usual mode of common carrier, including per diem. In the event that your travel is canceled or altered, all unused tickets for transportation must be returned to the appropriate travel office along with your travel orders and your completed travel voucher. All such tickets are the property of the U. S. Government and are not to be used for any travel that is not authorized.
5. SUBMISSION OF TRAVEL CLAIM. You must file your travel claim within 3 **working** days upon completion of your travel. A preaddressed envelope and travel voucher should be included with your orders.

INVITATIONAL TRAVEL ORDER (ITO) APPROVING OFFICIALS

COMMANDANT (G-C).

Spouses of Flag Officers.

Spouses of Flag officers are sometimes invited to participate in various Coast Guard functions (i.e., award ceremonies, commissioning of Coast Guard vessels, retirement ceremonies, etc.). It is the Commandant's policy that per diem will not be authorized for spouses of Flag officers while traveling with their sponsors.

Foreign Travel.

All invitational travel orders for foreign travel must be signed by the Commandant (G-C).

Retired Flag Officers.

Retired Flag officers are often invited as representatives of the Coast Guard to attend various committees, board meetings, conferences, and other functions which are directly related to the official business of the Coast Guard. All invitational travel orders for retired Flag officers must be signed by the Commandant (G-C). **(Except for former Commandants and Vice Commandants invited by G-CCS for Flag/SES conferences.)**

Note: All ITO's requested below the level of G-CCS or G-CCS's immediate staff but requiring approval of G-CCS or higher, must be coordinated through G-WP.

ALL HEADQUARTERS PROGRAM DIRECTORS.

The Commandant (G-C) has delegated the authority to sign ITO's to each Flag/SES level program director for official business related to the program. Examples of the use of ITO's include travel for members of Federal working groups, advisory and other standing committees. Program directors should identify such committees to Commandant (G-WP) to facilitate management of the ITO program.

CHIEF, MANAGEMENT EFFECTIVENESS STAFF.

Flag/SES Conferences. (For invitees pre-approved by G-CCS.)

Invitational travel orders for scheduled unpaid Flag/SES conference speakers.

Invitational travel orders for former Commandants and Vice Commandants to attend Flag/SES conferences.

DIRECTOR OF PERSONNEL MANAGEMENT (G-WP).

Private Persons Assigned Under the Intergovernmental Personnel Act (IPA).

Under the authority of 5 U. S. C. 3371 et. seq., the Coast Guard may assign private persons to work with the Coast Guard for extended periods of time. The Coast Guard does not pay the salaries of these individuals, but does provide reimbursement for their travel and per diem expenses while on assignment.

Individuals of the Award Recipient's Choosing to Attend Major Award Ceremonies.

Consistent with 5 U. S. C. 4503 and 10 U. S. C. 1124, travel expenses for the spouse, or one other individual of the recipient's choosing, to attend a major award ceremony (e.g., the annual Secretary's award ceremony, a Commandant level award ceremony, or a prestigious honorary award ceremony sponsored by a non-Federal organization) may be authorized if the Coast Guard determines that the presence of this individual would further enhance the purposes of the awards program.

Spouse of the Master Chief of the Coast Guard.

The spouse of the Master Chief of the Coast Guard is designated the Ombudsman at Large and, as such, is often required to travel with the Master Chief to visit various Coast Guard units to meet with the spouses and families of the enlisted personnel. All domestic ITO's for the spouse of the Master Chief of the Coast Guard must be signed by Commandant (G-WP).

Invitational Travel Orders Not Specific to an Individual Program.

All ITO's that have not been redelegated and are not tied to a specific program are to be approved by Commandant (G-WP).

COAST GUARD PERSONNEL COMMAND, CIVILIAN PERSONNEL MANAGEMENT DIVISION (CGPC-cpm).

Prospective Employees Being Interviewed for High Level and/or Hard to Fill Positions.

Under 5 U. S. C. 5706b, the Civilian Personnel Management Division may, if recommended by the selecting official, approve payment of expenses for travel to and from a preemployment interview for an individual being considered for employment with the Coast Guard.

COMMANDERS OF MAINTENANCE AND LOGISTICS COMMANDS.

Participants in Work-Life Ombudsman Training.

Under the authority of Title 10 U. S. C. 1588, the Coast Guard's Work-Life Program includes an Ombudsman element using unpaid volunteers to provide family services. Ombudsman training is conducted by the Work-Life staffs in the Integrated Support Commands (ISC's). Volunteers are reimbursed for travel and per diem expenses while being trained. The ITO's for volunteers, except those working on behalf of a district commander, are to be approved by the commander of the responsible maintenance and logistics command.

Spouses of Military Personnel to Attend Alcohol Recovery Treatment Programs.

Alcohol treatment is typically provided through Navy facilities to Coast Guard members who have an identified alcohol problem. In some instances, this includes inpatient treatment for members psychologically or physically dependent on alcohol. Family members often contribute to the member's alcohol dependency through certain behaviors in the relationships with the member (co-dependency). The Navy alcohol treatment centers often invite spouses of alcohol dependent members to attend a two-week co-dependency treatment to facilitate the member's recovery and return to productive Coast Guard service.

DISTRICT COMMANDERS.

Participants in Work-Life Ombudsman Training.

Under the authority of Title 10 U. S. C. 1588, the Coast Guard's Work-Life Program includes an Ombudsman element using unpaid volunteers to provide family services. Ombudsman training is conducted by the Work-Life staffs in the Integrated Support Commands (ISC's). Volunteers are reimbursed for travel and per diem expenses while being trained. The ITO's for volunteers working on behalf of a district are approved by the responsible district commander.